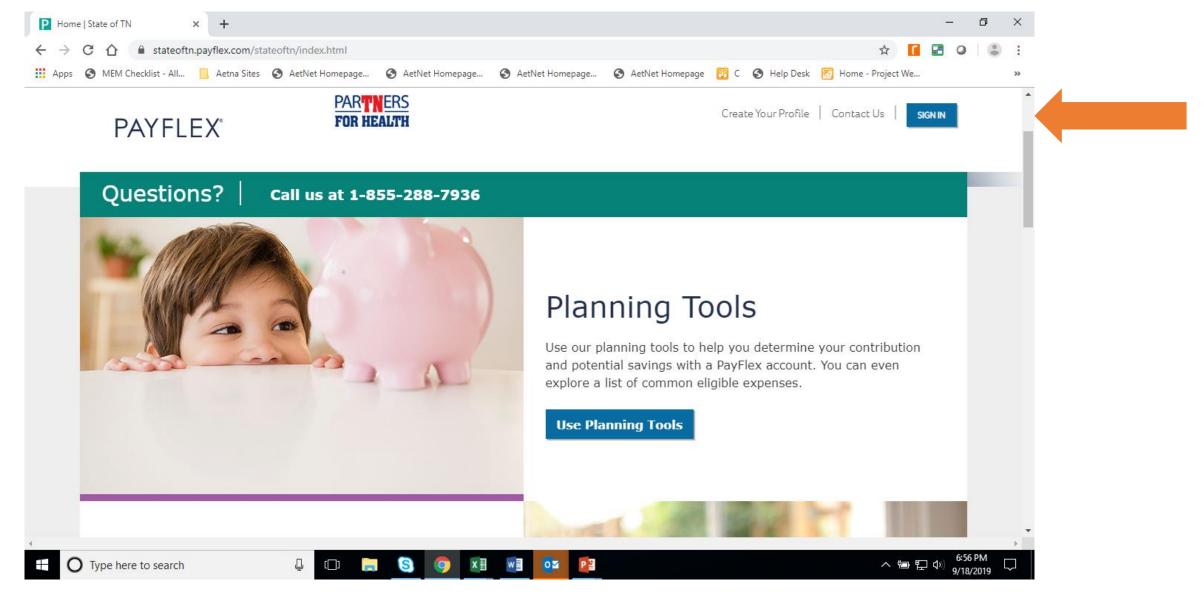# PAYFLEX MEMBER WEBSITE

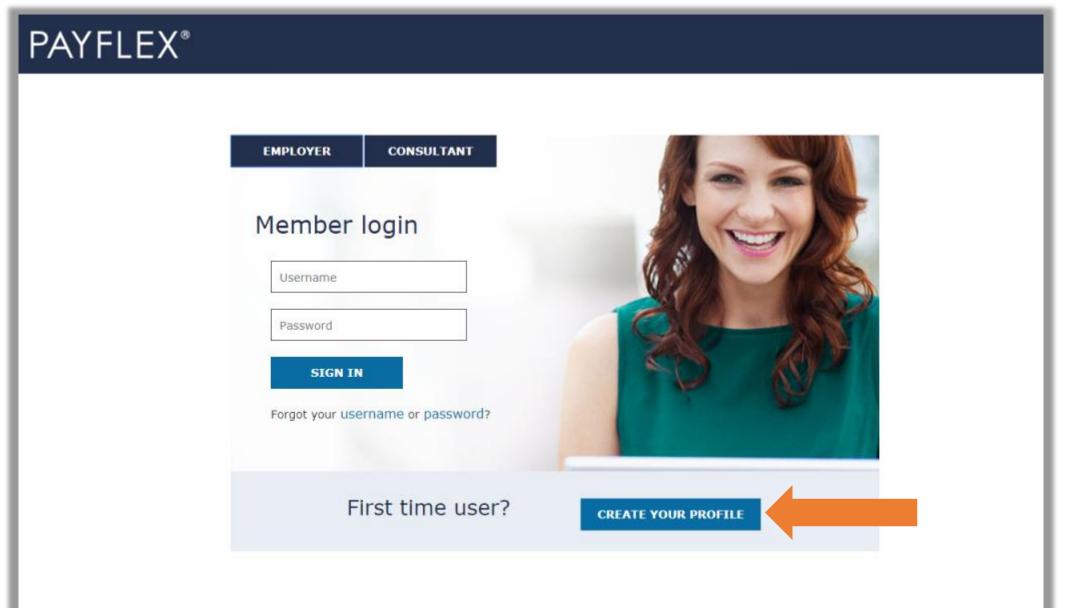Create Your Profile & Sign In

———

PAYFLEX®

Member website experience – Create Your Profile & Sign In

- **Members may access the PayFlex member website from:**

- **stateoftn.payflexdirect.com**

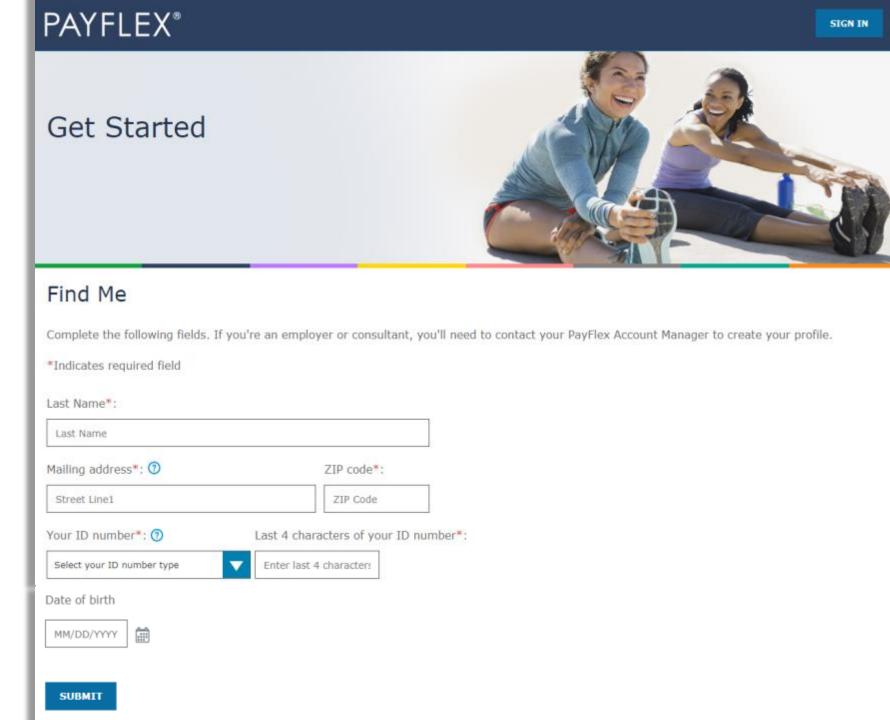Go to **stoftn.payflexdirect.com.** Click on **SIGN IN.**

Select CREATE YOUR PROFILE.

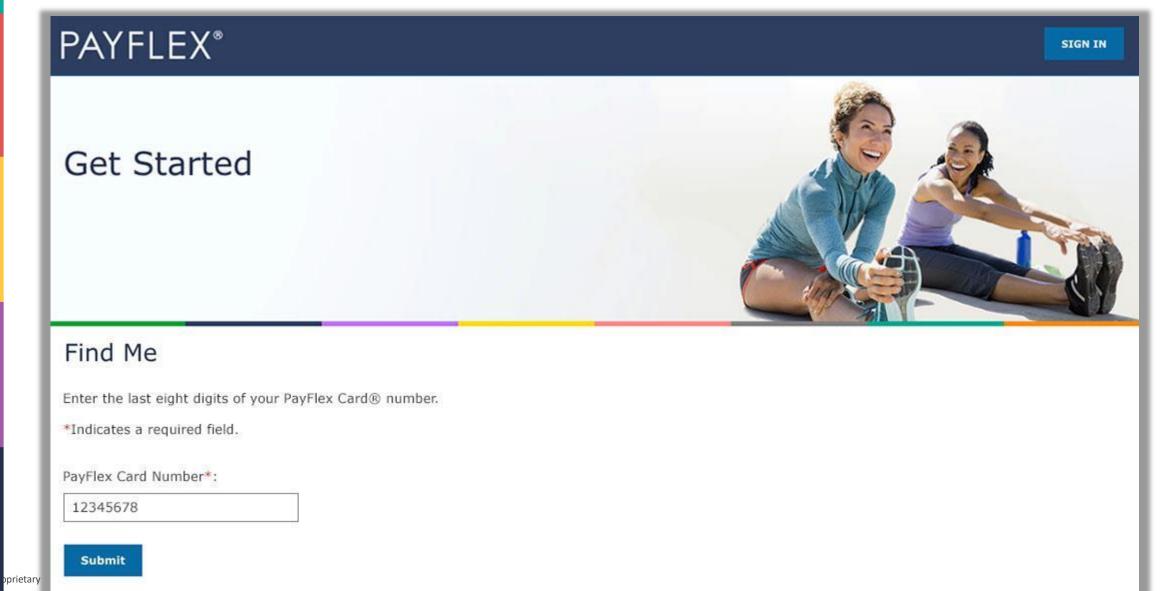## Complete this page to verify your identity.

QUICK TIPS

- **Your ID number** – This may be your Social Security number, Employee ID or employer designated number.

- **If your account includes a PayFlex Card®**, be sure to have it nearby. You'll need to enter the last 8 digits of your card number after this page.

PAYFLEX®

SIGN IN

Get Started

Find Me

Complete the following fields. If you're an employer or consultant, you'll need to contact your PayFlex Account Manager to create your profile.

*Indicates required field

Last Name*:

| Last Name |

Mailing address*: ⑦

| Street Line1 |

ZIP code*:

| ZIP Code |

Your ID number*: ⑦

| Select your ID number type ▼ |

Last 4 characters of your ID number*:

| Enter last 4 characters |

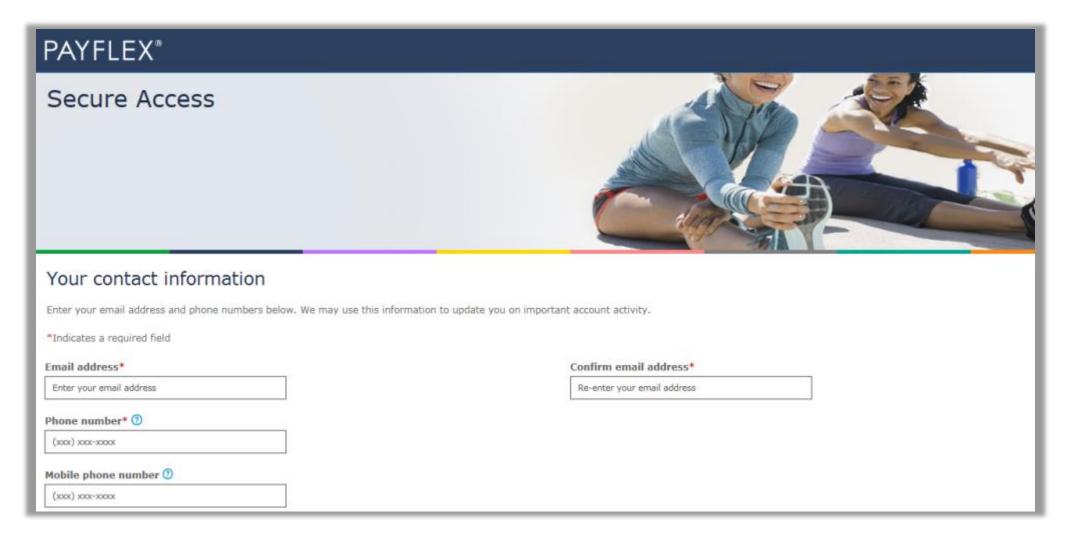Date of birth

| MM/DD/YYYY 🗓 |

SUBMIT

For cardholders only – enter the last 8 digits of your card number.

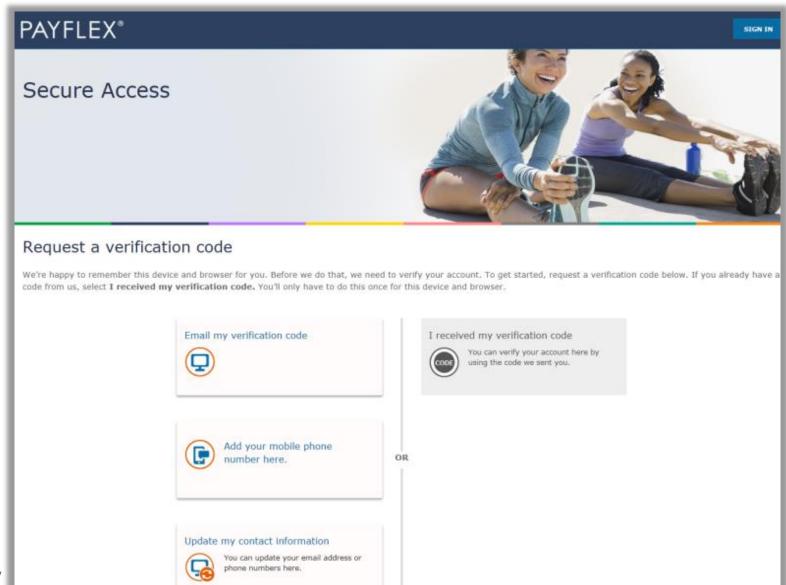If your account does **NOT** include a PayFlex Card®, you won't see this page.

PAYFLEX®

SIGN IN

Get Started

Find Me

Enter the last eight digits of your PayFlex Card® number.

*Indicates a required field.

PayFlex Card Number*:

12345678

Submit

Enter your email address and phone number.

- We may use this information to update you on important account activity.

PAYFLEX®

Secure Access

Your contact information

Enter your email address and phone numbers below. We may use this information to update you on important account activity.

*Indicates a required field

Email address*

Enter your email address

Confirm email address*

Re-enter your email address

Phone number* ⑦

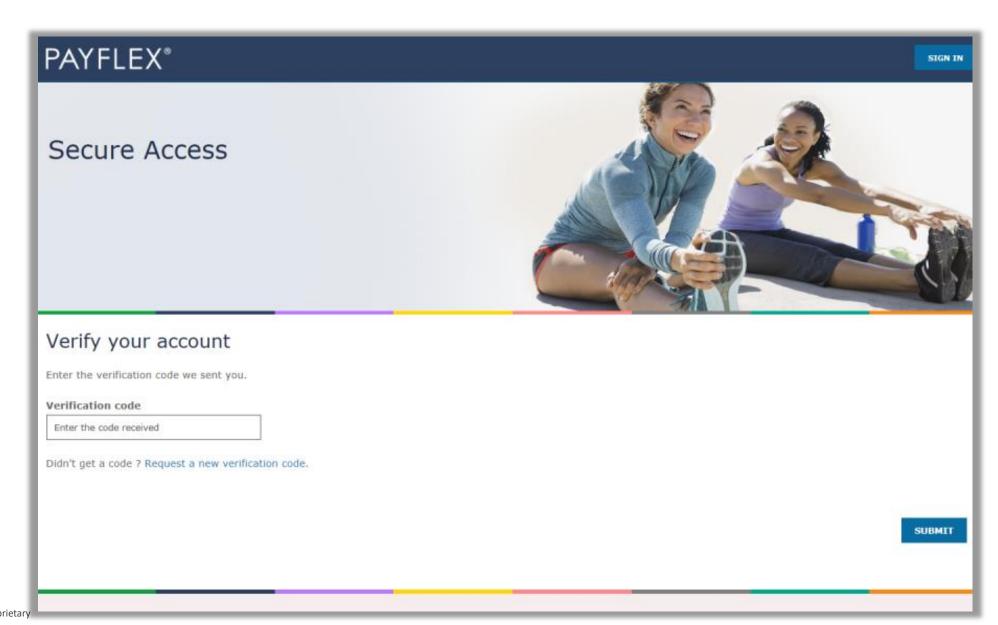(xxx) xxx-xxxx

Mobile phone number ⑦

(xxx) xxx-xxxx

Request a verification code to be sent by email or text.

This is how we verify your account. And it helps us remember your device and browser the next time you login.
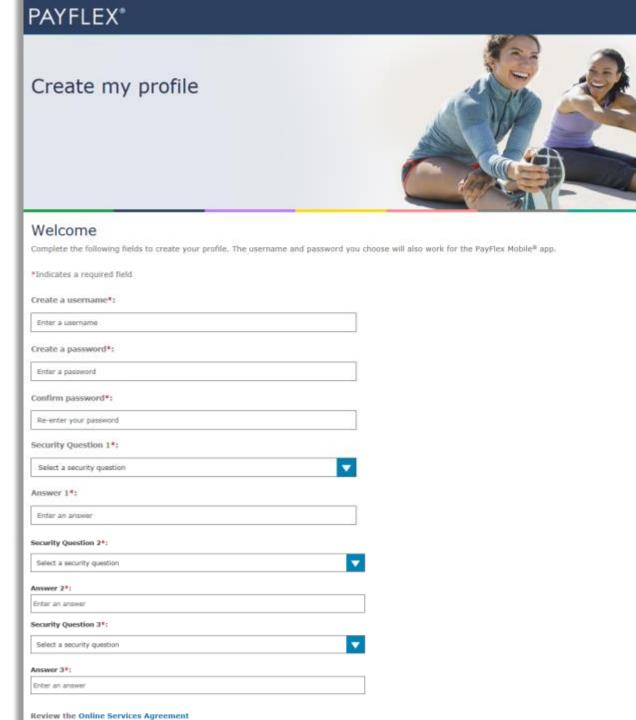
Enter your verification code.

PAYFLEX®

Secure Access

Verify your account

Enter the verification code we sent you.

Verification code

Enter the code received

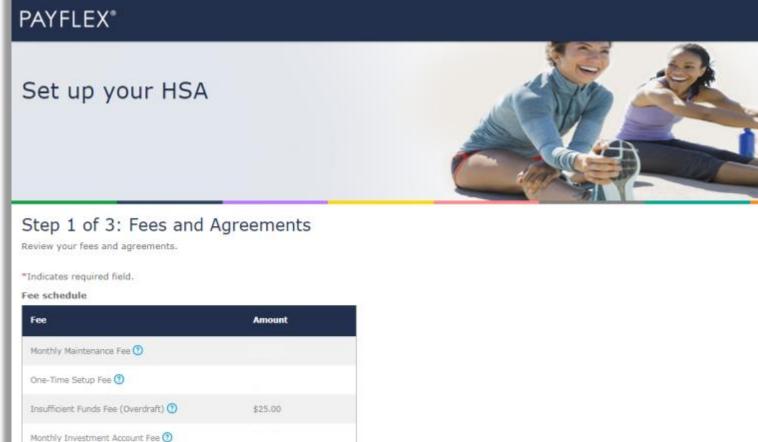Didn't get a code ? Request a new verification code.

SUBMIT

Create your profile

- After you verify your account, you'll create your profile. We'll ask you to:

- Create a username and password

- Set up security questions and answers

- Review/accept the Online Services Agreement

- **QUICK TIP:** After you create a username and password, you can use it to log into the PayFlex Mobile® app.

PAYFLEX®

SIGN IN

Create my profile

Welcome

Complete the following fields to create your profile. The username and password you choose will also work for the PayFlex Mobile® app.

*Indicates a required field

Create a username*:

[Enter a username]

Create a password*:

[Enter a password]

Confirm password*:

[Re-enter your password]

Security Question 1*:

[Select a security question ▼]

Answer 1*:

[Enter an answer]

Security Question 2*:

[Select a security question ▼]

Answer 2*:

[Enter an answer]

Security Question 3*:

[Select a security question ▼]

Answer 3*:

[Enter an answer]

Review the **Online Services Agreement**

If you're a new **HSA member**, you'll need to complete a few steps to set up your HSA.

SIGN OUT

Set up your HSA

Step 1 of 3: Fees and Agreements

Review your fees and agreements.

*Indicates required field.

Fee schedule

Fee	Amount
Monthly Maintenance Fee ⓘ	
One-Time Setup Fee ⓘ	
Insufficient Funds Fee (Overdraft) ⓘ	$25.00
Monthly Investment Account Fee ⓘ	
Deposit Item Returned ⓘ	$25.00
Bill Pay (postage included) ⓘ	
Monthly Paper Account Statement ⓘ	
Account Closure Fee ⓘ	

Review the HSA Custodial Agreement

☐ I have received, read, understand and agree to the terms of the agreements, including the fees.*

Your initials* [Enter your initials]

SAVE AND CONTINUE

Set up your HSA

Step 2 of 3: Personal Information

Complete all required fields.

*Indicates required field.

Name	Tucker Sebastian
Address	7612TH Omaha NE 68154
Social Security number	XXX-XX-3676
Date of birth	04/01/1999

Marital status*

Select your marital status ▼

High deductible health plan start date*

01/01/2018 📅

Under Internal Revenue Service (IRS) regulations, the high deductible health plan (HDHP) start date helps determine when an HSA can be opened and how much you can contribute to your HSA. You or your employer provided an HDHP start date shown above. If you were enrolled in an HDHP prior to this date, you should update your HDHP start date on this page. PayFlex is not responsible for determining the accuracy of this information.

High deductible health coverage* ⓘ

Select your coverage type ▼

SAVE AND CONTINUE

Set up your HSA

Step 3 of 3: Beneficiaries

Add a primary beneficiary

You can name a person, trust, or your estate as your primary beneficiary for your HSA. The primary beneficiary will receive any remaining balance in your HSA after your death. You can have more than one beneficiary. If you do, you'll need to assign percentages to each beneficiary. The percentages determine the amount each beneficiary will receive from your HSA.

You can also name a contingent beneficiary. A contingent beneficiary receives your HSA balance if your primary beneficiaries are deceased at the time of your death. If you need to make changes later, you (the account holder) can do it in Account Settings.

*Indicates required field.

Select your primary beneficiary*

Select type of beneficiary ▼

⊖ Beneficiary Terms

- If all of my beneficiaries predecease me, my HSA funds will be paid to my estate.

- If my spouse is my beneficiary and receives my HSA, they may choose to continue the HSA in their name. This is subject to the HSA Custodian's consent. My spouse must also provide a written election, sign the forms and provide the required information to the HSA Custodian to open an HSA with PayFlex.

- If my beneficiary is not my spouse, the HSA terminates as of my date of death and any remaining balance is paid to my beneficiary(ies).

- I understand that in certain states, my spouse's consent may be necessary if I wish to name a person as my beneficiary other than or in addition to my spouse. I also understand that I should consult with my attorney before making this type of beneficiary designation.

- By naming a beneficiary, I represent and warrant to the HSA Custodian that this beneficiary designation satisfies all legal requirements under applicable law and, on behalf of myself, the beneficiary or beneficiaries, my heirs and my estate, I hereby indemnify and hold the HSA Custodian harmless from and against any and all claims, damages, liabilities, and costs (including attorney's fees) arising as a result of the HSA Custodian's payment of my HSA balance in accordance with this beneficiary designation.

- The HSA Custodian may ask my beneficiary(ies) for proof of identity and entitlement to payment before making a final payout from my HSA.

SAVE AND CONTINUE

Set up your HSA

Step 3 of 3: Beneficiaries

Add a primary beneficiary

You can name a person, trust, or your estate as your primary beneficiary for your HSA. The primary beneficiary will receive any remaining balance in your HSA after your death. You can have more than one beneficiary. If you do, you'll need to assign percentages to each beneficiary. The percentages determine the amount each beneficiary will receive from your HSA.

You can also name a contingent beneficiary. A contingent beneficiary receives your HSA balance if your primary beneficiaries are deceased at the time of your death. If you need to make changes later, you (the account holder) can do it in Account Settings.

*Indicates required field.

Select your primary beneficiary*

Person ▼

Beneficiary first name*

First name

Beneficiary last name*

Last name

Address*

Address line 1

Address Line 2

Address line 2

City* | **State*** | **ZIP code***

City | Select state ▼ | Zip code

Social Security number*

Social security number

Relationship*

Select relationship ▼

Phone number

(xxx) xxx-xxxx

Date of birth*

MM/DD/YYYY 📅

➕ **Beneficiary Terms**

Set up your HSA

Step 3 of 3: Beneficiaries

My Beneficiaries

Success! You've named a beneficiary for your HSA.

You may add, change or remove your beneficiary at any time prior to your death.

Primary Beneficiary	Percentage ❓	
Samantha Sebastian	100%	Edit
	Total: 100%	

ADD A PRIMARY BENEFICIARY   ADD A CONTINGENT BENEFICIARY

SAVE AND CONTINUE

Set up your HSA

Step 3 of 3: Beneficiaries

My Beneficiaries

Success! You've named a beneficiary for your HSA.

You may add, change or remove your beneficiary at any time prior to your death.

Primary Beneficiary	Percentage ❓	
Samantha Sebastian	100%	Edit
	Total: 100%	

ADD A PRIMARY BENEFICIARY   ADD A CONTINGENT BENEFICIARY

SAVE AND CONTINUE

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